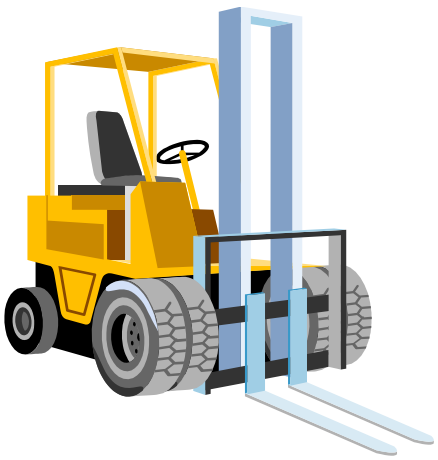
FORKLIFT TRAINING PROGRAM



FORMAL (CLASSROOM) INSTRUCTION PROGRAM

NOTICE TO MANAGEMENT
(READ BEFORE CONTINUING)

A forklift is classified by regulation as a "powered industrial truck." Facilities that operate a forklift must ensure that each operator is "competent to operate the forklift safely." This competence must be demonstrated by the successful completion of training and an evaluation of the operator's performance. Training must consist of formal training (lectures, video tapes, etc.) and practical training involving actual operation of the forklift. Any operational training and evaluation must be conducted by an individual who has the "knowledge, training and experience" to train operators and evaluate their performance.

To help clients comply with this regulatory requirement, KPA has reviewed the applicable regulation and has prepared this sample formal (classroom) instruction program and an online training program. **Please note, KPA is not an expert on forklifts or on the training requirements for any particular forklift. Instead, its knowledge is limited to that obtained from a review of the Powered Industrial Truck Regulation. Consequently, if a facility wishes to make use of this sample document, it must first carefully review and modify it as necessary to ensure it suits circumstances at the facility.** If modifications are minor, KPA may, on request, be able to conduct this classroom training. The facility can also use an alternate training source. **KPA is not able to conduct any operational training or performance evaluation.** Finally, other equipment such as walking pallet trucks and tow tractors may also be regulated as "powered industrial trucks." Please note that this training and evaluation process applies to all powered industrial trucks and that they should refer to the federal regulation (29CFR1910.178) or equivalent state standard for additional information.

FORKLIFT TRAINING PROGRAM

CLASSROOM INSTRUCTION OUTLINE

I. Introduction:

A. Definition:

A "powered industrial truck" is any mobile power-propelled truck used to carry, push, pull, lift, stack or tier materials. Powered industrial trucks can be ridden or controlled by a walking operator. A forklift is a powered industrial truck. Other examples include walking pallet trucks and tow tractors.

This training program is for forklift operators.

B. Differences Between a Forklift and an Automobile:

A forklift is basically a lever on wheels. An important difference between an automobile and a forklift is that a forklift steers with the rear wheels and has a front drive axle. Also, a forklift travels in reverse almost as much time as it travels forward. As a result, forklift transmissions usually have forward and reverse speeds of equal gearing and power. In addition, most forklifts are powered by either LPG (propane) or electric batteries. Some additional differences between a forklift and an automobile include:

- On most forklifts there are no speedometers.
- When an operator drives a forklift, his body is exposed to temperatures, dust, chemical emissions and other environmental conditions.
- Unlike automobiles, most forklifts allow for only one person – the operator.

C. Reason for Forklift Training:

- Annual forklift/powered industrial truck accident toll:
  - 100 fatalities
  - 36,000 serious injuries
- OSHA's estimate: 20 – 25% of accidents are caused, at least in part, by inadequate operator training.

II. Training Requirements:

OSHA regulations mandate that forklift operators receive both formal (classroom) instruction and practical training on the forklift(s) they will operate. This training class is intended to satisfy the requirement for the formal/classroom instruction. In addition to providing a regulatory overview, this instruction will focus on providing:

- General guidelines on forklift operation.
- General safety guidelines.

After this training is completed, individuals who operate forklifts should receive practical training so that they will be able to properly and safely operate the forklift(s) at their facility. This practical training will include:

- Hands-on training on how to operate the forklift.
- Re-training as may be needed to ensure continued safe operation of the forklift.
- Refresher training at least once every three years.

Again, this training is required for all employees that operate a forklift.

III. Classroom Training Elements:

A. Truck Related Topics:

1. General information on typical forklift controls:

- **Ignition:** Insert correct key in the ignition and turn it clockwise to activate the starter. Make sure the brake is set and the clutch depressed.
- **Brake foot pedal:** Step on the brake to slow the forklift. The greater the pressure, the faster the forklift will stop.
- **Hand brake:** The hand brake is usually on the right side of the vehicle. It is to be used for a parking brake or in the event of an emergency. It must be set whenever you get off the forklift. Usually one pulls upward to set the brake and pushes forward to release it. **DO NOT OPERATE A FORKLIFT WITH THE HAND BRAKE ON.**
- **Gearshift lever:** The gearshift lever is usually located to the left side of the steering column, just under the steering wheel. Putting the lever in forward (or up) position will cause the forklift to move forward. The middle position is neutral while to back, or rear position is reverse. **THE LEVER SHOULD BE IN THE NEUTRAL POSITION PRIOR TO STARTING A FORKLIFT.**
- **Fork control and attachments:** The fork control lever is typically located to the right of the steering column, either on the dash or to the right of the seat. Raising the lever (or pulling it backwards) normally raises the forks. Depressing the lever (or pushing it forward) will normally lower the forks.
- **Mast tilt:** The lever to control the tilt of the mast is usually located to the right of the forklift control lever. Raising the lever (or pulling it backward) will normally tilt the top of the mast back towards the forklift. Pushing forward (or depressing) the lever will normally move the top of the mast forward – away from the forklift.
- **Horn:** The horn is typically located at the top of the steering column, near or at the center of the steering wheel. This is similar to automobiles.

2. Steering and Maneuvering:

- **Steering:** As noted earlier, the rear wheels do the steering on a forklift. Consequently, be careful to allow enough clearance when turning a corner.
  - Steer the forklift close to the inside corner and start the turn just after the front wheels pass the inside corner.
  - Appropriate steering techniques should be used when turning in confined and limited spaces.
  - Always take care to ensure that no personnel are within the truck's danger zone.
  - The forklift responds quickly when the steering wheel is turned. **DO NOT MAKE TURNS AT HIGH SPEED.**
- **Proper speed:** There are no speedometers on forklifts.
  - Use good judgment according to the area in which you are traveling. Do not, however, exceed 6 mph or, if more restrictive, any onsite speed limit established by facility management.
  - Use especially slow speeds in confined or well- traveled areas. Always use slow speeds until you are totally familiar with the particular forklift you are operating as well as the work areas through which you are traveling.
- **Ramps and grades:** Go up and down grades and ramps slowly. Always travel with the forks pointing uphill. When operating a loaded forklift, drive forward when going up ramps and backward (in reverse) when going down ramps.
- **Viewing direction:** While in motion, always look in the direction you are heading.

- **Horn use:** Stop and sound the horn in areas where your view is blocked and before turning all corners.
- **Brake use:** Use the brake when coming to a stop. Do not stop by putting the forklift in reverse.
- **Rules of the road:** Observe all traffic regulations, including any posted speed limits (for forklifts) and forklift stop signs.
  - When crossing a public street, use the closest gate and drive the shortest and most direct route.
  - Yield the right of way to all street traffic.
  - Cross railroad tracks diagonally whenever possible and never park closer than 8 ½ feet from the center of a railroad track.
  - Avoid running over loose objects on the roadway.
- **Pedestrian safety:** Never drive a forklift up to anyone standing in front of a fixed object. Never drive with forks elevated.
- **Loading docks:** While operating a forklift on a loading dock, do not drive close to the edge of the ramp or platform.
- **Utility use:** Do not use a forklift to open or close doors.

3. Visibility:

- **Direction of travel:** The forklift driver should always look in the direction of travel.
  - If the load obstructs the operator's viewpoint, the lift should be driven in reverse.
- **Blind corners:** Stop and sound the horn in areas where your view is blocked and before turning all corners.

4. Forklift Use and Operations:

- **Load Handling:** Use extreme care when tilting a load forward or backward, particularly with high stacking.
  - Tilt elevated forks forward only to place them under an elevated load.
  - Do not tip an elevated load forward except when in the process of placing the load on a rack or stack.
- **Tractor Trailer Use:** When loading and unloading trucks and trailers, ensure that the wheels of these units are first chocked with brakes set in order to prevent movement.
  - Before driving a forklift onto a truck or trailer, check the flooring for breaks and weaknesses.
  - Ensure that the dock plate is secure and safe for travel into and out of the trucks and trailers that require loading and unloading.
  - Look over dock boards slowly and never exceed their rated capacity.
- **Lifting Capacity:** Note the lifting capacity of your forklift and do not exceed these limits.
  - This loading capacity reading should be printed in clear view of the operator.
  - In addition to other dangers, overloading a forklift significantly affects its steering.
- **Traveling with a Load:** Carry your load as low to the ground as possible (approximately six inches above the ground).
  - You may need to raise the forks slightly before climbing a ramp so that they do not scrape the ground.
  - Watch out for low overhead items such as gas, air and sprinkler pipes.
  - Never place a load down in front of a fire door.
- **Picking up and stacking pallets:**
  - Make sure that the top surface of the forks is at the same angle as the top of the pallet.
  - Approach the load squarely so that the corners of the pallet are at an equal distance from the side of the forks and with the forks half way between the top and bottom of the pallet.

- Place the forks as far as possible under the load.
- Raise the forks slowly until they are touching the underside of the pallet top. Make sure that the pallet is not touching or caught on any other object.
- Never pick up a pallet that appears to be unsafely loaded. If the load is off center, try to center it before lifting. If it cannot be centered, then separate the forks as wide as possible and try to position them equidistant from the center of gravity of the load. **IF IN DOUBT, DO NOT LIFT THE LOAD. ASK YOUR SUPERVISOR FOR GUIDANCE.**
- Slowly lift the load. After it is clear of all obstacles, tilt the mast slightly back.
- Always travel in the direction you can see.

- **Picking up two pallets at a time:**
  - Place the first pallet squarely on top of the second. Make sure that the top pallet is stable and that the bottom pallet has an even load.
  - Be sure to check the total weight of the combined load before picking up the pallets to be sure that it is not greater than the capacity of the forklift. If it is, or if you are unsure of this, do not attempt to pick up the load.
  - Pick up the pallets using the same procedure outlined above for picking up and stacking pallets.
  - Never drive a forklift forward with a double load.
  - Start transporting the load very slowly making sure that the steering will respond by making a slight turn. If the forklift does not respond properly or does not respond at all, then the load is too heavy. Set it down and move one pallet at a time.
- **Positioning loads at destination:**
  - Slowly approach the area where the pallet is to be placed.
  - When at the destination, smoothly stop the forklift and straighten the mast so that the bottom of the pallet is at the same angle as the ground.
  - Align the pallet to the exact placement wanted and lower the load.
  - Lower the forks so that they are in the open space between the upper and lower levels of the pallet. Slowly back away being careful to look to the rear.
- **Forklift capacity:**
  - Know the lifting capacity of your forklift and do not exceed these limits. This load capacity should be printed in clear view of the operator. In addition to other dangers, overloading a forklift significantly affects its steering.
  - The operator of the forklift must always ensure that the load is within the rated capacity for the forklift, taking into account the task to be performed.
  - If a loaded forklift does not steer properly, the load is too heavy or is otherwise unsafe to transport. Set the load down and advise your supervisor.

5. Vehicle inspection and maintenance:

Each day, prior to operating the forklift, the operator should complete a pre-operational forklift safety checklist. You may want to document these inspections to show that they are being conducted. A complete list of items to check can normally be found in the operator's manual and typically includes many of the following:

Brakes	Hydraulic Fluid	Gauges
Tires	Forks	Horn
Oil	Mast	Lights
Fuel	Load Backrest	Steering
Water	Overhead Guard	Levers/Controls

The forklift should also be inspected to ensure that it is clean and free of debris. It should be driven forward for several feet and braked to a stop to ensure brakes are working properly. Anything out of the

ordinary should be reported to your supervisor before you begin driving the forklift.

OSHA has developed sample checklists for a variety of powered industrial trucks for use in situations where the operator's manual does not provide machine specific inspection items. These checklists should be used as an example and should be modified to the specific equipment used at your facility. The checklists are available in Attachment B of this program.

6. Refueling/battery recharging:

- **LPG (propane):** When replacing a propane tank of fuel follow these procedures and safety guidelines:

  1. Set the hand brake on the forklift.
  2. Close the valve on the LPG tank.
  3. Remove the connecting hose.
  4. Remove the LPG tank.
  5. Replace it with a full unit.
  6. Tighten the securing strap.
  7. Attach the hose to the LPG tank to fuel the forklift.

  - The person changing LPG tanks should wear gloves to prevent frostbite from LPG that may potentially escape during a refueling process.
  - LPG tanks should never be filled while the engine is running.
  - If LPG tanks are refilled onsite, ensure that all refilling is performed outdoors and that care is taken to avoid overfilling the tank.

- **Batteries:** If your forklift is the electric type and will not immediately be used by the next shift, take it to the battery charging area. Properly position it and set the brake before attempting to change or charge batteries. Connect charging cables and make sure they are secure.
  - Before charging batteries, ensure cells are filled with enough distilled water to cover the top of the plates in the cell. Do not overfill.
  - Take care to ensure that vent caps are functioning properly. Open the battery (or compartment) cover(s) to release heat and gases that may build up during charging.
  - Take care to prevent open flames, sparks or electric arcs in battery charging areas. Keep tools and other metallic objects away from the top of uncovered batteries.

7. General operating limitations for forklifts:

- Have any unusual operating noises or odors checked immediately.
- Do not operate a forklift with a leak in the fuel, oil or hydraulic systems.
- Do not operate internal combustion forklifts in unventilated areas or inside for extended periods of time.
- Do not drive a forklift that is in need of repair, defective, or in any way unsafe. Ensure any such forklift is tagged "inoperable" until repairs are completed.
- Keep engine oil level at "full" on the dipstick.
- Clean up any spillage of oil or hydraulic fluid from the forklift before starting or restarting the engine.
- Keep the forklift in a clean condition, free of lint, excess oil and grease. Follow precautions regarding toxicity, ventilation, and fire hazards when using a cleaning agent or solvent on the forklift.

8. Additional safety rules:

- Never operate a piece of equipment for which you are not qualified.
- Never allow a person to stand or pass under the elevated portion of any forklift, whether loaded or empty.
- Use only approved safety platforms to raise or lower personnel with a forklift.
- Never permit a rider on a forklift especially on the forks themselves.
- Never place arms, legs or feet between the uprights of the mast or outside the running lines of the forklift.
- Be alert to the presence of pedestrians. Give pedestrians the right of way.
- Stunt driving and horseplay are strictly prohibited.
- Slow down when operating the forklift on wet or slippery floors.
- Set the brakes and lower the forks fully every time you get off your forklift.
- When parked on an incline, lower the load and tilt it against the backrest (mast).
- Set brakes and chock wheels. Turn power off.
- If you cannot see your forklift or are more than 25 feet away from it, it is considered unattended. When a forklift is unattended, fully lower the forks, shut off the power, and set the brakes.
- Never smoke in the charging area.
- Allow only authorized personnel to perform fueling, refueling or recharging operations.
- Report all accidents, even if no one was hurt.

B. Workplace Related Topics:

Discuss the following facility specific circumstances:

1. Surface conditions where forklift will be operated.
2. Composition and stability of loads typically transported.
3. Particular issues involving stacking, unstacking and general load manipulation.
4. Pedestrian traffic and areas of the facility where operators should be especially attentive to the matter.
5. Any narrow aisles or restricted areas that might constrain forklift operation.
6. Areas at the facility where the forklift/operator might be exposed to special hazards.
7. Location and characteristics of ramps and other sloped surfaces that could affect forklift stability.
8. Any closed environments or areas of insufficient ventilation in which a forklift may have to operate.
9. Other unique or potentially hazardous conditions at the facility.

Forklift Operating Rules

Every employer using industrial trucks or industrial tow tractors shall post and enforce a set of operating rules including the appropriate rules listed below:

1. Only drivers authorized by the employer and trained in the safe operations of industrial lift trucks shall be permitted to operate such vehicles. Methods shall be devised to train operators in safe operation of powered industrial trucks.
2. Stunt driving and horseplay are prohibited.
3. No riders shall be permitted on vehicles unless provided with adequate riding facilities.
4. Employees shall not ride on the forks of lift trucks.
5. Employees shall not place any part of their bodies outside the running lines of an industrial truck or between mast uprights or other part of the truck where shear or crushing hazards exist.
6. Employees shall not be allowed to stand, pass, or work under the elevated portion of any industrial truck, loaded or empty, unless it is effectively blocked to prevent it from falling.
7. Drivers shall check the vehicle at least once per shift, and if it is found to be unsafe, the matter shall be reported immediately to a foreman or mechanic, and the vehicle shall not be put in service again until it has been made safe. Attention shall be given to the proper functioning of all forklift systems including but not limited to tires, horn, lights, battery, controller, brakes, steering mechanism, cooling system, and the lift system of the forklifts (forks, chains, cable and limit switches).
8. No truck shall be operated with a leak in the fuel system.
9. Vehicles shall not exceed the authorized or safe speed, always maintaining a safe distance from other vehicles, keeping the truck under positive control at all times and all established traffic regulations shall be observed. For trucks traveling in the same direction, a safe distance maybe considered to be approximately 3 truck lengths or preferably a time lapse – 3 seconds – passing the same point.
10. Trucks traveling in the same direction shall not be passed at intersections, blind spots, or dangerous locations.
11. The driver shall slow down and sound the horn at cross aisles and other locations where vision is obstructed. If the load being carried obstructs forward view, the driver shall be required to travel with the load trailing.
12. Operators shall look in the direction of travel and shall not move a vehicle until certain that all persons are in the clear.
13. Trucks shall not be driven up to anyone standing in front of a bench or other fixed object of such size that the person could be caught between the truck and object.
14. Grades shall be ascended or descended slowly.
    - When ascending or descending grades in excess of 10 percent, loaded trucks shall be driven with the load upgrade.
    - On all grades the load and load engaging means shall be tilted back if applicable, and raised only as far as necessary to clear the road surface.
    - Motorized hand and hand/rider trucks shall be operated on all grades with the load-engaging means downgrade.
15. The forks shall always be carried as low as possible, consistent with safe operations.
16. When leaving a vehicle unattended, either:
    - The power shall be shut off, brakes set, the mast brought to the vertical position, and forks left in the down position. When left on a incline, the wheels shall be blocked; or
    - The power may remain on provided the brakes are set, the mast is brought to the vertical position, forks are left in the down position, and the wheels shall be blocked, front and rear.
17. When the operator of an industrial truck is dismounted and within 25 feet (7.6 meters) of the truck which remains in the operator's view, the load engaging means shall be fully lowered, controls neutralized, and the brakes set to prevent movement.
18. Vehicles shall not be run onto any elevator unless the driver is specifically authorized to do so. Before entering an elevator, the driver shall determine that the capacity of the elevator will not be exceeded. Once on an elevator, the power shall be shutoff and the brakes set.
19. Motorized hand trucks shall enter elevators or other confined areas with the load end forward.
20. Vehicles shall not be operated on floors, sidewalk doors, or platforms that will not safely support the loaded vehicle.
21. Prior to driving onto trucks, trailers and railroad cars, their flooring shall be checked for breaks and other structural weaknesses.
22. The width of one tire on the powered industrial truck shall be the minimum distance maintained from the edge by the truck while it is on any elevated dock, platform, freight car or truck.
23. Trucks shall not be loaded in excess of their rated capacity.
24. A loaded vehicle shall not be moved until the load is safe and secure.
25. Extreme care shall be taken when tilting loads. Tilting forward with the load engaging means elevated shall be prohibited except when picking up a load. Elevated loads shall not be tilted forward except when the load is being deposited onto a storage rack or equivalent. When stacking or tiering, backward tilt shall be limited to that necessary to stabilize the load.
26. The load-engaging device shall be placed in such a manner that the load will be securely held or supported.
27. Special precautions shall be taken in the securing and handling of loads by trucks equipped with attachments, and during the operation of these trucks after the loads have been removed.
    - The entire door opening operation shall be in full view of the operator.
    - The truck operator and other employees shall be clear of the area where the door might fall while being opened.
28. If loads are lifted by two or more trucks working in unison, the total weight of the load shall not exceed the combined rated lifting capacity of all trucks involved

Copies of these instructions, printed in a language understood by the majority of the employees, shall be conspicuously posted at a place frequented by the drivers.

FORKLIFT TRAINING PROGRAM
CLASSROOM INSTRUCTION QUIZ

Name _____ Job Position _____ Date _____

FORKLIFT OPERATION AND SAFETY REVIEW (Circle the correct answer: T = True, F = False)

T F 1. It is the responsibility of the forklift operator to be aware of the various workplace conditions that exist at the facility.

T F 2. When parking, raise the forks at least 6 feet off the ground.

T F 3. Since the rear wheels guide the turning of a lift truck, the rear end of the truck will tend to swing wide in a turn.

T F 4. Never back up a ramp when there is a load on the forks.

T F 5. Always get off the truck before you operate the lift or tilt controls.

T F 6. When loading, drive forward until the forks are as far as possible under the load, lift the load slightly and tilt it back. Then, back into the aisle until the load is clear and readjust the carriage so that the load is four to six inches off the ground.

T F 7. If a load blocks your view, travel in reverse.

T F 8. Back through blind intersections when possible.

T F 9. At the end of the day, the truck should be left wherever it is most convenient for the operator with the forks up high.

T F 10. A lift truck operator must always be able to clearly see where he is going.

T F 11. Forks should always be raised a short distance off the ground when traveling with a load.

T F 12. It is unsafe to carry loads that weigh more than the rated capacity of the truck.

T F 13. A forklift truck turns in exactly the same manner as an automobile.

T F 14. It is the lift truck operator's responsibility to watch out for sprinkler heads, or other obstructions, which may present overhead clearance problems.

T F 15. Always slow down and sound the horn when approaching an intersection.

T F 16. Carrying loads that weigh more than the capacity of the truck is not permitted.

T F 17. Always drive forward down steep ramps to avoid spilling your load.

T F 18. If the lift mechanism on your truck makes an unusual noise, you should tell your supervisor about it at the end of the day.

T F 19. Pedestrians and fellow workers are responsible for staying out of the way of your truck.

T F 20. There are really no differences between operating a forklift and an automobile.

ANSWERS TO QUIZ
FORKLIFT OPERATION & SAFETY

1. T
2. F
3. T
4. T
5. F
6. T
7. T
8. T
9. F
10. T
11. T
12. T
13. F
14. T
15. T
16. T
17. F
18. F
19. F
20. F

MEMORANDUM

From: KPA LLC.
To: Facility Management
Subject: Requirement for Forklift Operator Practical Training
Encl: (1) Forklift Operators' Performance Evaluation (Draft)

1. State/Federal regulations mandate that forklift operators receive training on how to properly and safely operate the forklift(s) they will operate. This training must consist of two elements:
   - Formal (Classroom) Instruction
   - Practical (Hands-on) Training and Evaluation

   KPA has prepared a Sample Classroom Training program that management can use, though it must first review and modify it as necessary to be appropriate for circumstances and equipment at your facility. If changes are minor, KPA may, on request, be able to conduct this classroom training. A different party can also provide the training. Practical training and evaluation however must be conducted by an individual (or individuals) who has the knowledge, training and experience to train forklift operators and evaluate their performance. KPA is not qualified to conduct this training.
2. Employees must receive both formal instruction and practical training, and be evaluated prior to operating a forklift (except for training purposes).
3. Operator practical training must be carried out under the direct supervision of a qualified trainer and conducted in a location that does not endanger the trainee or other employees. As noted above, an individual is qualified to conduct this training by virtue of possessing the "knowledge, training and experience" to train forklift operators and evaluate their performance.
4. Refresher training, including an evaluation of the effectiveness of the operator training, is required when:
   - An operator is found to be unsafely operating a forklift
   - An accident or near miss occurs
   - Different equipment is introduced
   - Workplace conditions change
   - An evaluation indicates the need
5. An evaluation of each forklift operator's performance must be conducted at least once every three years.
6. KPA has prepared the attached draft Forklift Operator's Performance Evaluation, which should be modified as appropriate for use at your facility. Any evaluation used should address facility specific issues. Special attention should be given to any lifting situation, facility condition, etc. that might pose a stability (overturning) risk for the forklift.

Operator's Name: _____

FORKLIFT OPERATORS' PERFORMANCE EVALUATION	Satisfactory	Needs Practice	Unsatisfactory
Forklift Inspection			
Properly completes the inspection checklist prior to operating forklift.	❑	❑	❑
Use of controls and instrumentation			
Directional control (forward, neutral, reverse).	❑	❑	❑
Lift control (raise, lower, tilt).	❑	❑	❑
Knowledge of instrumentation functions.	❑	❑	❑
Maneuvering skills			
Smooth starting and stopping.	❑	❑	❑
Drives safely and under control in both forward and reverse.	❑	❑	❑
Proper speed.	❑	❑	❑
Turns corners correctly – aware of rear end swing.	❑	❑	❑
Selecting and picking up load			
Knows the capacity of the forklift and checks load weight.	❑	❑	❑
Approaches load properly.	❑	❑	❑
Properly seats forks and pickup technique.	❑	❑	❑
Uses proper pickup technique	❑	❑	❑
Tilts load back slightly against backrest.	❑	❑	❑
Load balanced properly.	❑	❑	❑
Carries load low; 6" – 8" off ground.	❑	❑	❑
Yields to pedestrians.	❑	❑	❑
Lowers load smoothly/slowly.	❑	❑	❑
Drives with forks low to ground (6" – 8" off ground).	❑	❑	❑
Driving with a load and driver visibility			
Smooth starting and stopping.	❑	❑	❑
Proper speed during turns.	❑	❑	❑
Slows at intersections and corners.	❑	❑	❑
Looks in both directions and sounds horn at intersections.	❑	❑	❑
Keeps to the right in aisles and maintains proper clearance.	❑	❑	❑
Travels at least three lengths behind other vehicles.	❑	❑	❑
Handles load in manner to prevent product damage.	❑	❑	❑
Keeps clear view of direction of travel.	❑	❑	❑
Drives backward in reverse when necessary to maintain visibility.	❑	❑	❑
Remains alert to overhead obstructions.	❑	❑	❑
Vehicle parking			
Parks on level area.	❑	❑	❑
Sets forks flat on floor.	❑	❑	❑
Sets parking brake.	❑	❑	❑
Removes key.	❑	❑	❑
Demonstrates ability to refuel and/or recharge batteries.	❑	❑	❑
Site specific hazards			
Reviewed surface hazards. (Ramps, curbs, pavement changes, oily floors, etc.)	❑	❑	❑
Reviewed facility hazards. (Overhead lines, ceilings, confined spaces, etc.)	❑	❑	❑
Reviewed on-site traffic patterns. (One ways, blind corners, pedestrian crossings, etc.)	❑	❑	❑
Reviewed locations where forklift should not be operated due to potential stability problems.	❑	❑	❑

Remarks:

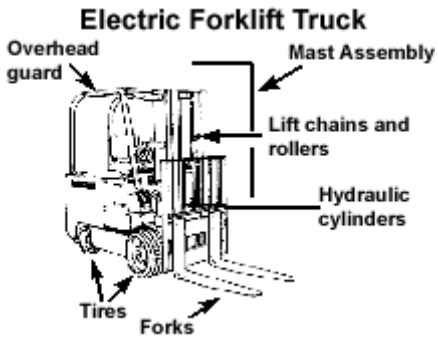
FINAL EVALUATION: ❑ **Pass** ❑ **Fail**

Evaluator's Name: Date:

KPA recommends that the trainee demonstrate satisfactory performance in each category prior to receiving a passing evaluation.

OSHA Daily Inspection Checklist: Electric Forklift Truck

KEY OFF Procedures



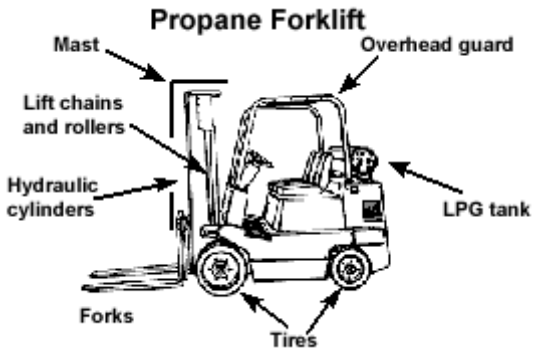
- The vehicle inspection
  - Overhead guard
  - Hydraulic cylinders
  - Mast assembly
  - Lift chains and rollers
  - Forks
  - Tires
- Examine the battery
- Check the hydraulic fluid level

KEY ON Procedures

- Check the gauges
  - Hour meter
  - Battery discharge indicator
- Test the standard equipment
  - Steering
  - Brakes
  - Front, tail, and brake lights
  - Horn
  - Safety seat (if equipped)
- Check the operation of load-handling attachments

OSHA Daily Inspection Checklist: Propane Forklift Truck

KEY OFF Procedures



- The vehicle inspection
  - Overhead guard
  - Hydraulic cylinders
  - Mast assembly
  - Lift chains and rollers
  - Forks
  - Tires
  - LPG tank and locator pin
  - LPG tank hose
  - Gas gauge
- Check the engine oil level
- Examine the battery
- Check the hydraulic fluid level
- Check the engine coolant level

KEY ON Procedures

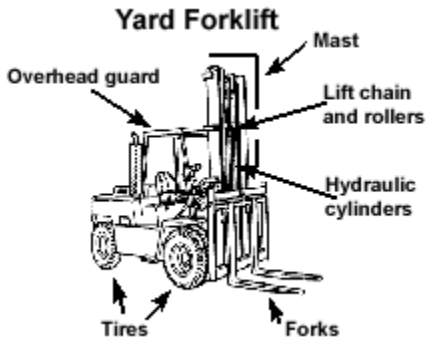
- Test the front, tail, and brake lights

ENGINE RUNNING Procedures

- Check the gauges
  - Oil pressure indicator lamp
  - Ammeter indicator lamp
  - Hour meter
  - Water temperature gauge
- Test the standard equipment
  - Steering
  - Brakes
  - Horn
  - Safety seat (if equipped)
- Check the operation of load-handling attachments
- Check the transmission fluid level

OSHA Daily Inspection Checklist: Yard Forklift Truck

KEY OFF Procedures



- The vehicle inspection
  - Overhead guard
  - Hydraulic cylinders
  - Mast assembly
  - Lift chains and rollers
  - Forks
  - Tires
  - LPG tank and locator pin
  - LPG tank hose
  - Gas gauge
- Check the engine oil level
- Examine the battery
- Inspect the hydraulic fluid level
- Check the engine coolant level

KEY ON Procedures

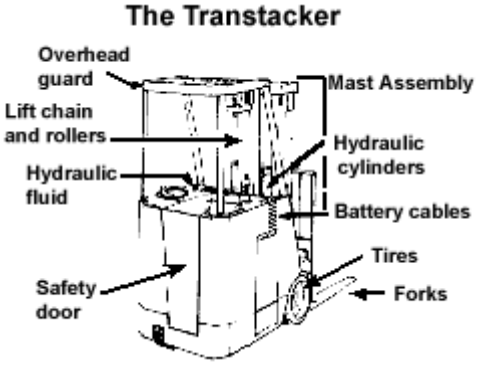
- Test the standard equipment
  - Front, tail, and brake lights
  - Fuel gauge (if diesel)
  - Windshield wiper
  - Heater

ENGINE RUNNING Procedures

- Check the gauges
  - Oil pressure indicator lamp
  - Ammeter indicator lamp
  - Ammeter
  - Hour Meter
  - Water Temperature Gauge
- Test the standard equipment
  - Steering
  - Brakes
  - Horn
  - Safety seat (if equipped)
- Check the operation of load-handling attachments
- Check the transmission fluid level

OSHA Daily Inspection Checklist: Electric Transtacker

KEY OFF Procedures



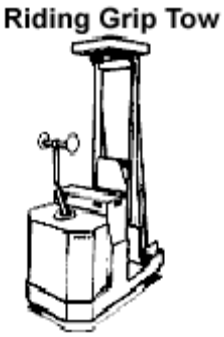
- The vehicle inspection
  - Overhead guard
  - Hydraulic cylinders
  - Mast assembly
  - Lift chains and rollers
  - Forks
  - Tires
  - Battery cables
  - Safety door

KEY ON Procedures

- Check the gauges
  - Battery discharge indicator
  - Hour meter
- Test the standard equipment
  - Steering Brakes
  - Lights
  - Horn
- Test the control lever
- Check the operation of load-handling attachments

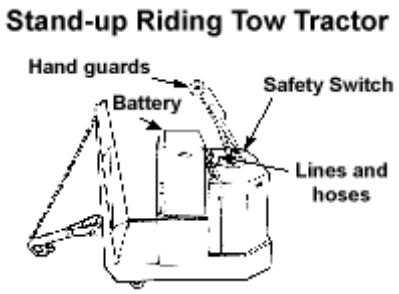
OSHA Daily Inspection Checklist: Riding Grip Tow

- The vehicle inspection
  - Lines and hoses
  - Battery
  - Safety switch
  - Hand guards
- The operations inspection
  - Test the brakes
  - Check the drive operations
  - Test the horn
  - Check the grip coupling



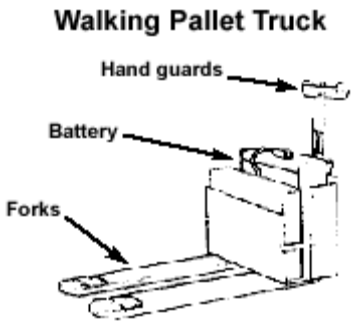
OSHA Daily Inspection Checklist: Stand-up Riding Tow Tractor

- The vehicle inspection
  - Lines and hoses
  - Battery
  - Safety switch
  - Hand guards
- The operations inspection
  - Test the brakes
  - Check the drive operations
  - Test the horn
  - Check the tow hook and safety catch



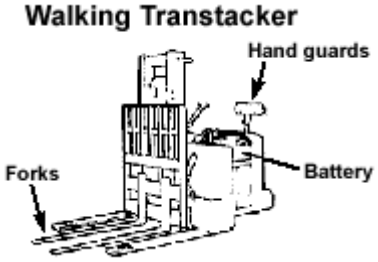
OSHA Daily Inspection Checklist: Walking Pallet Truck

- The vehicle inspection
  - Forks
  - Battery
  - Hand guards
- The operations inspection
  - Check the drive operations
  - Test the brakes
  - Check the horn
  - Inspect the load-handling attachment operations



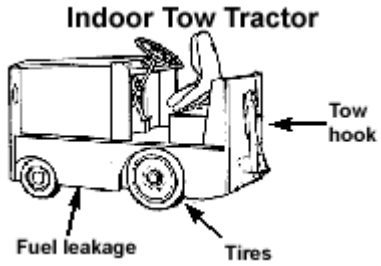
OSHA Daily Inspection Checklist: Walking Transtacker

- The vehicle inspection
  - Forks
  - Battery
  - Hand guards
- The operations inspection
  - Check the drive operations
  - Test the brakes
  - Check the horn
  - Inspect the load-handling attachment operations



OSHA Daily Inspection Checklist: Indoor Propane Tow Tractor

KEY OFF Procedures



- The vehicle inspection
  - Fluid leakage
  - Tires
  - Tow hook
  - Windshield (if equipped)
  - Overhead guard (if equipped)
  - LPG tank and locator pin
  - LPG tank hose
  - Gas gauge
- Check the engine oil level
- Check the engine coolant level
- Examine the battery

KEY ON Procedures

- Test the front, tail, and brake lights
- Check the gauges
  - Oil pressure gauge
  - Ammeter
  - Water temperature gauge
  - Hour meter

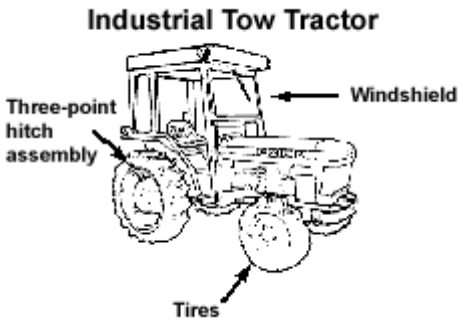
ENGINE RUNNING Procedures

- Inspect the standard equipment
  - Steering
  - Brakes
  - Horn
  - Safety seat (if equipped)
- Check the transmission fluid level

OSHA Daily Inspection Checklist: Industrial Tractors

KEY OFF Procedures

- The vehicle inspection
  - Windshield
  - Tires
  - Three-point hitch assembly
- Engine oil
- Engine coolant



KEY ON Procedures

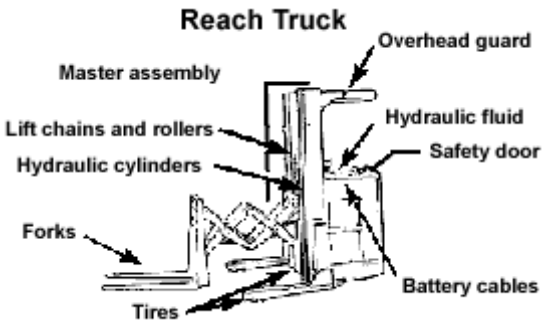
- Check gauges
  - Oil and battery lights
  - Temperature
  - Hour meter
- Standard equipment
  - Steering
  - Front, tail, and brake lights
  - Horn

ENGINE RUNNING Procedures

- Standard equipment
  - Windshield wiper
  - Brakes
  - Hoist operation

OSHA Daily Inspection Checklist: Reach Truck

KEY OFF Procedures



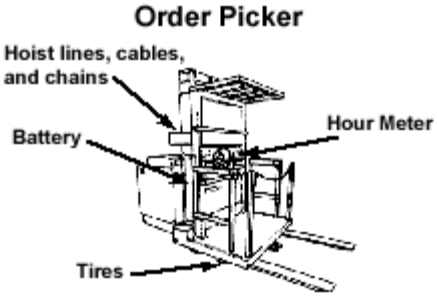
- The vehicle inspection
  - Overhead guard
  - Hydraulic cylinders
  - Mast assembly
  - Lift chains and rollers
  - Forks
  - Tires
  - Battery cables
  - Safety door
  - Hydraulic fluid

KEY ON Procedures

- Check the gauges
  - Battery discharge indicator
  - Hour meter
- Test the standard equipment
  - Steering
  - Brakes
  - Lights
  - Horn
- Test the control lever
- Check the operation of load-handling attachments

OSHA Daily Inspection Checklist: Order Picker

KEY OFF Procedures



The vehicle inspection
- Hoist lines, cables, and chains
- Hour meter
- Tires
- Battery cables
- Limiting device

KEY ON Procedures

Check the battery discharge indicator
Test the standard equipment
- Safety interlock
- Steering
- Brakes
- Lights
- Horn

Check the accessories
- Gripper jaws
- Work platform

SAMPLE OSHA GENERIC CHECKLIST FOR POWERED INDUSTRIAL TRUCKS

- ❒ **Overhead Guard** - Are there broken welds, missing bolts, or damaged areas?
- ❒ **Hydraulic Cylinders** - Is there leakage or damage on the lift, tilt, and attachment functions of the cylinders?
- ❒ **Mast Assembly** - Are there broken welds, cracked or bent areas, and worn or missing stops?
- ❒ **Lift Chains and rollers**
  - ❒ Is there wear or damage or kinks, signs of rust, or any sign that lubrication is required?
  - ❒ Is there squeaking?
- ❒ **Forks**
  - ❒ Are they cracked or bent , worn, or mismatched?
  - ❒ Is there excessive oil or water on the forks?
- ❒ **Tires** - What do the tires look like?
  - ❒ Are there large cuts that go around the circumference of the tire?
  - ❒ Are there large pieces of rubber missing or separated from the rim?
  - ❒ Are there missing lugs?
  - ❒ Is there bond separation that may cause slippage?
- ❒ **Battery Check**
  - ❒ Are the cell caps and terminal covers in place?
  - ❒ Are the cables missing insulation?
- ❒ **Hydraulic Fluid** - Check level?
- ❒ **Gauges** - Are they all properly working?
- ❒ **Steering**
  - ❒ Is there excessive free play?
  - ❒ If power steering, is the pump working?
- ❒ **Brakes**
  - ❒ If pedal goes all the way to the floor when you apply the service brake, that is the first indicator that the brakes are bad. Brakes should work in reverse, also.
  - ❒ Does the parking brake work? The truck should not be capable of movement when the parking brake is engaged.
- ❒ **Lights** - If equipped with lights, are they working properly?
- ❒ **Horn** - Does the horn work?
- ❒ **Safety seat** - if the truck is equipped with a safety seat is it working?
- ❒ **Load Handling Attachments**
  - ❒ Is there hesitation when hoisting or lowering the forks, when using the forward or backward tilt, or the lateral travel on the side shift?
  - ❒ Is there excessive oil on the cylinders?
- ❒ **Propane Tank** - Is the tank guard bracket properly positioned and locked down?
- ❒ **Propane Hose**
  - ❒ Is it damaged? It should not be frayed, pinched, kinked, or bound in any way.
  - ❒ Is the connector threaded on squarely and tightly?
- ❒ **Propane Odor** - If you detect the presence of propane gas odor, turn off the tank valve and report the problem.
- ❒ **Engine Oil** - Check levels.
- ❒ **Engine Coolant** - Visually check the level. Note: Never remove the radiator cap to check the coolant level when the engine is running or while the engine is hot. Stand to the side and turn your face away. Always use a glove or rag to protect your hand.
- ❒ **Transmission Fluid** - Check levels?
- ❒ **Windshield Wipers** - Do they work properly?
- ❒ **Seat Belts** - Do they work?
- ❒ **Safety Door** - (found on stand up rider models) Is it in place?
- ❒ **Safety Switch** - (found on stand up riding tow tractors) Is it working?
- ❒ **Hand guards** - (found on stand up riding tow tractors, walking pallet trucks, walking transtackers) Are they in place?
- ❒ **Tow Hook**
  - ❒ Does it engage and release smoothly?
  - ❒ Does the safety catch work properly?
- ❒ **Control Lever** - Does the lever operate properly?
- ❒ **Safety Interlock** - (found on order pickers) If the gate is open, does the vehicle run?
- ❒ **Gripper Jaws** - (found on order pickers) Do the jaws open and close quickly and smoothly?
- ❒ **Work Platform** - (found on order pickers) Does the platform raise and lower smoothly?